

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM

LIHEAP LEVERAGING REPORT

SUMMARY PAGE

Grantee:

California Department of Community Services and Development

Base Period:

10/01/03 -- 9/30/04

Address:

700 N. 10th Street

Estimated reporting burden= 38 hours total

Sacramento, CA 95814

Name and telephone number of person(s) to contact for further information:

Wendy Wohl, Chief Deputy Director (916) 341-4301

On this Summary Page, show the grand totals for all leverages resources that the grantee proposes to count for this base period. Items B through E are to show the sums of the information from item 1 of the Resource/Benefit Description Pages, Part 1 of this form.

A. Total Number of Leveraged Resources	B. Total gross value of countable benefits provided by these resources to low income households during this base period.	C. Total amount of grantee's own funds used to leverage these resources (not including funds from grantee's Federal LIHEAP allotment)	D. Total costs/charges to low income households to participate/receive these benefits	E. Net value of these resources/benefits (To calculate item E, subtract items C and D from item B.)
17	\$499,872,520	\$0	\$0	\$499,872,520
F. Amount of funds from grantee's Federal LIHEAP allotment used to identify, develop, and demonstrate leveraging programs during this base period				\$3,341
G. Final net value of leveraged resources/benefits to be counted for this base period (To calculate item G, subtract item F from Item E.)				\$499,869,179

I certify that, to the best of my knowledge, the information in this LIHEAP Leveraging Report is correct, and documentation to support this information is readily available and will be submitted upon request to the U.S. Department of Health and Human Services.

Original Signed by Wendy Wohl

Chief Deputy Director

11/24/2004

Signature of Chief Executive Officer or Designee

Title

Date

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 1

A. Resource/benefit name: Discount of Energy Costs Provided by Utility Companies: Reduction in Utility Rates

B. Gross value of countable benefits provided by resource is base period: \$453,339,228

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$453,339,228

2. Type of Resource: _____ Cash xxx Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric (PG&E), City of Lodi, Southern California Gas Company (SCGC), Bear Valley Electric, Southwest Gas Corporation, Southern California Edison (SCE), Anaheim Utilities, San Diego Gas and Electric (SDG&E), Pacific Power, Imperial Irrigation District, City of San Luis Obispo, City of Healdsburg, City of Santa Clara, Sacramento Municipal Utility District (SMUD), Avista Utilities, Modesto Irrigation, and Sierra Pacific Power, and Lassen Municipal Utility District.

4. Brief description of resource:

10-30% Discount on monthly energy bills.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households are provided a 10-30% discount on their monthly energy bills.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 3,124,046

9. Eligibility standard(s) for low income households to whom benefits were provided:

	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

San Joaquin County Department of Aging and Community Services, San Bernardino County Community Services Department, Redwood Community Action Agency, Orange County Community Development Council, Inc., Ventura County Commission on Human Concerns, Great Northern Corporation, Campesinos Unidos, Inc., Del Norte Senior Center, San Luis Obispo County Economic Opportunity Commission, Inc., Riverside County Department of Community Action, California Department of Community Services and Development, Kern County Economic Opportunity Council, and Contra Costa County Community Services Department, Lassen-Plumas-Sierra CAA and Merced CAA.

Pacific Gas and Electric (PG&E), City of Lodi, Southern California Gas Company (SCGC), Bear Valley Electric, Southwest Gas Corporation, Southern California Edison (SCE), Anaheim Utilities, San Diego Gas and Electric (SDG&E), Pacific Power, Imperial Irrigation District, City of San Luis Obispo, City of Healdsburg, City of Santa Clara, Sacramento Municipal Utility District (SMUD), Avista Utilities, Modesto Irrigation, and Sierra Pacific Power, and Lassen Municipal Utility District.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

The benefits were quantified by the utility companies who maintain a separate rate schedule for individuals receiving a discount. On a monthly basis each utility company calculates the difference between the discounted billings and what would have been billed without the discount. Example: The non-discounted rate is .10924 cents/kWh, the discounted rate is .09271 and kWh used in the billing period is 683. Full price bill = \$74.61 (.10924 x 683) discount billing = \$63.32 (.09271 x 683) Discount = \$11.29 (\$74.61 - \$63.32).

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- | | |
|------------|--|
| _____ | (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid. |
| _____ | (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan. |
| <u>xxx</u> | (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program. |

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 A B C xxx D E xxx F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Benefits were distributed as described in California's FY 2004 LIHEAP State Plan. The discounted programs, referred to as California Alternate Rates for Energy (CARE), Reduced Rate Program (RRP), Low-Income Discount Program (LIDP) and Energy Assistance Program Rate (EAPR) have been coordinated with the federally funded energy assistance program LIHEAP. CSD has contracted with Avista Corp, City of Healdsburg, City of Santa Clara, Modesto Irrigation District, Pacific Power and Light, SPPCo, and the Sacramento Municipal Utilities District to provide income eligibility verification of utility customers participating within the utility sponsored reduced rate program. Contracting utility companies reimburse CSD for all services rendered under terms of verification and certification contract services agreement.

Because the eligibility criteria for HEAP and the utility reduced rate program offered by Avista Corp, Pacific Power and Light, and SPPCo are almost identical, a dual-purpose application was developed to serve the dual purpose of allowing individuals to apply for both programs. HEAP/CARE applications are either mailed or distributed by either CSD or its network of Community Services Agencies. Upon request from their customers, the utilities mail out applications as a result of utility or CSD network marketing.

Applicants either mail their HEAP/CARE applications to the local community services agency for processing or they receive in person, one-on-one, intake at the local level. Community services agencies utilize an automated services system, known as the California LIHEAP Automated Services System, for eligibility verification and client data input of both HEAP and CARE applicants. CSD provides PP&L, SPPCo, and Avista, with a computer tape/printout each week containing a listing of all applicants determined eligible for the CARE discount rate. The utility company then applies the discount to the eligible customers' accounts. Therefore, after eligibility has been determined, the applicant receives both the discounted rate and the HEAP benefit payment. These two benefits combined together allow for a greater impact in offsetting the costs of energy for these low-income households. Note: CSD also maintains toll free "800" telephone lines for customers to request an application or to inquire about HEAP and CARE Programs throughout the State.

For the City of Healdsburg, City of Santa Clara, Modesto Irrigation District and the Sacramento Municipal Utilities District (SMUD) the customers can obtain a copy of an application either from their respective utility company, through the local community action agency or directly from CSD. Once CSD processes the application, a computer tape/printout is then delivered each week to the utility company which contains a listing of all applicants determined eligible for the discount rate. The utility company then applies the discount to the eligible customers' accounts.

In addition, local agencies and CSD have coordinated the services provided under LIHEAP with the Pacific Gas and Electric Company, Southern California Gas Company; San Diego Gas and Electric, Southern California Edison and their reduced rate programs. The coordination of these programs enables the agencies to expand services to families who otherwise would not receive assistance due to lack of information about the programs. This coordination occurs through prearranged agreements between the local CSD/LIHEAP contractors and the utility companies.

The LIHEAP contractors work in direct conjunction with the utility companies by maintaining ongoing communication to screen and refer potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if the applicant from either source has already received any benefits. The applicant is provided assistance in completing an application for the reduced rate programs at the time the applicant is being assisted for HEAP.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 2

A. Resource/benefit name: Utility Company Weatherization - Weatherized Additional Low-Income Households: Cash benefits on behalf of recipient households for weatherization assistance.

B. Gross value of countable benefits provided by resource is base period: \$21,051,051

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$21,051,051

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric (PG&E), Imperial Irrigation District, Southern California Gas Company (SCGC), San Diego Gas and Electric (SDG&E), Southern California Edison (SCE), Anaheim Utilities, Southwest Gas Corporation, Sierra Pacific Power Company, and Avista Utilities (A/U).

4. Brief description of resource:

Private and municipal utility companies provided funds to weatherize LIHEAP eligible households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See Item 4.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 47,034

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Campeños Unidos, Inc. (CUI), Orange County Community Development Council, Inc., Ventura County Commission on Human Concerns, Self-Help Home Improvement Project, Inc. (SHHIP), North Coast Energy Services, Maravilla Foundation, Metropolitan Area Advisory Committee (MAAC), San Bernardino County Community Services Department, Colusa-Glenn-Trinity Community Action Agency, Santa Barbara County Community Action Agency, Project GO, Inc., Community Enhancement Services (CES), Riverside County Department of Community Action, Fresno County Economic Opportunity Council, San Luis Obispo County Economic Opportunity Commission, Inc., and Veterans In Community Services, Inc., (VICS).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and labor used to install the measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 A B xxx C D E xxx F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated and integrated with the LIHEAP program, in part, due to the fact that the local agencies provide for a single intake process for weatherization services and then determine which program best meets the need of the individual client. Due to the high demand for low-income weatherization in California, there are insufficient LIHEAP funds available to meet this need. Because this resource is administered by the same agencies that provide weatherization services, these funds allow for the weatherization of more LIHEAP-eligible households, than is possible with LIHEAP funds alone. Finally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity within the low-income community.

The agencies listed on Page 2, #10 of this resource coordinated their LIHEAP contracts with their utility company contracts which included the same allowable weatherization measures as listed in the LIHEAP contract. This leveraging enabled the agencies to weatherize additional low-income homes using the measures allowed within the utility contracts and are the same as those listed under Resource #5. All client files are documented and maintained at each respective agencies.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 3

A. Resource/benefit name: Utility Company Weatherization - Combined with LIHEAP: Cash benefits on behalf of recipient households for weatherization assistance.

B. Gross value of countable benefits provided by resource is base period: \$854,492

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment):

D. Costs and charges to low income households to participate/receive these benefits:

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$854,492

2. Type of Resource: xxx Cash Discount/ Waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Power, Sacramento Municipal Utility District (SMUD), Turlock Irrigation District, Pacific Gas and Electric (PG&E), Southern California Gas Company (SCGC), Modesto Irrigation District, and San Diego Gas & Electric (SDGE).

4. Brief description of resource:

Private and municipal utility companies provided funds to weatherize LIHEAP eligible households with one or more of the weatherization measures listed in Resource #5.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See Item 4.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 1,219

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Del Norte Senior Center, Community Resource Project, Inc. (CRP), Amador-Tuolumne Community Action Agency (ATCAA), North Coast Energy Services, Great Northern Corporation, Riverside County Department of Community Action, Central Valley Opportunity Center, Inc. (CVOC), Metropolitan Area Advisory Committee (MAAC), San Luis Obispo Economic Opportunity Commission, Inc., and Central Coast Energy Services (CCES).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of the local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and the labor used to install these measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A xxx B C D E F xxx G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP due to funds from both sources (LIHEAP and utility companies) being used in the same household. The low-income household, therefore, was further weatherized to prevent the loss of heated and/or cooled air from the dwelling. As a result of the coordination of the weatherization contracts, additional LIHEAP-eligible households received weatherization measures mentioned in Resource #5, as appropriate and as allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 4

A. Resource/benefit name: Utility Company Weatherization Inspection

B. Gross value of countable benefits provided by resource is base period: \$769,429

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$769,429

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Power, Pacific Gas and Electric (PG&E), Southern California Gas Company (SCGC), Southern California Edison (SCE), Anaheim Utilities, and Southwest Gas Corporation.

4. Brief description of resource:

Private utility companies provided funds to inspect weatherized LIHEAP eligible households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Quality control is assured for weatherized low-income households.

6. Geographical area in which benefits were provided:

Del Norte, Los Angeles, Orange, Riverside, Colusa, Glenn, Trinity, and San Bernardino Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 18,318

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Del Norte Senior Center, Pacific Asian Consortium in Employment (PACE), Orange County Community Development Council, Inc., Riverside County Department of Community Action, Colusa-Glenn-Trinity Community Action Agency, San Bernardino County Community Services Department and Community Enhancement Services (CES).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and the utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Del Norte: \$75 x 31 units = \$2,325
PACE: \$40.61 x 9,083 units = \$368,861
\$41.77 x 3,285 units = \$137,214
Orange: \$55 x 567 units = \$31,185
CES: \$37 x 1000 units = \$37,000
Riverside: \$50 x 81 units = \$4,050
San Bernardino: \$42.50 x 544 units = \$23,120 and \$45.43 x 841 units = \$38,207
and \$44.10 x 2,669 units = \$117,702
Colusa-Glenn-Trinity: \$45 x 217 units = \$9,765

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- xxx (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____ A _____ B _____ C _____ D _____ E _____ F _____ G _____ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
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Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 5

A. Resource/benefit name: Bulk Purchase Discount for Weatherization Materials

B. Gross value of countable benefits provided by resource is base period: \$4,879,576

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$4,879,576

2. Type of Resource: _____ Cash xxx Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Bulk purchases of weatherization materials were made at over 50 various businesses located throughout the State (e.g. Home Depot, building-material suppliers, hardware stores.)

4. Brief description of resource:

Weatherization materials purchased in bulk at discount included those needed for minor home repairs. These repairs are necessary for the effective performance or preservation of weatherization materials or to prevent air infiltration. Minor Housing Envelope Repair purchases included paint used to protect the materials installed; door shoes, door locksets (knobs), raindrips, automatic door bottoms, and the hardware associated with the repair (nails, screws, anchors, etc.) of heating and cooling ducts.

Weatherization materials purchased also included weatherstripping, insulation cellulose, door weatherstripping, thresholds, hot water heater blankets, cooler covers, low-flow showerheads, doors, thermopane windows, glass, hardware, attic vents, heating units, set-back thermostats, latex glazing, tape header jackets, and caulking.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount on materials allowed for additional dwellings to be weatherized with one or more of the following measures: Glass replacement, attic venting, ceiling insulation, low-flow showerheads, evaporative cooler vent covers, door weatherstripping, water heater blankets, water heater pipe wrap, duct wrap, switch and outlet gaskets, caulking, and nondoor weatherstripping, ceiling fans, evaporative cooler repair, filter replacement for air conditioning or furnace units, floor foundation venting, floor insulation, gas/electric water heater timers, setback thermostats, shadescreens, shutters, storm windows, tinted film, wall insulation, water-flow-restricting devices, wood-fueled space heaters, furnace/boiler replacement and heating/air conditioning source repair.

Contractors must maintain a separate file for each applicant certified as eligible to receive weatherization assistance. Each file must contain an Intake and Job Order Sheet which is used for client intake, assessment of the dwelling and inspection of the weatherization measures installed; copies of source documents supporting eligibility; and a Building Check and Job Order Sheet, which is used for documenting repairs, labor hours and costs.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03 -- 9/30/04

8. Number of low-income households to whom benefits were provided in this base period:

16,833

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Orange County Community Development Council, Inc., Del Norte Senior Center, Community Services and Employment Training, Inc. (C-SET), Community Resource Project (CRP), San Francisco Economic Opportunity Council, San Mateo County Community Action Agency, Inc., Campesinos Unidos, Inc. (CUI), Pacific Asian Consortium in Employment (PACE), Economic and Social Opportunities, Inc. (ESO), Ventura County Commission on Human Concerns, El Dorado County Department of Community Services, Redwood Community Action Agency, North Coast Energy Services, City of Berkeley, Great Northern Corporation, Riverside County Department of Community Action, Metropolitan Area Advisory Committee (MAAC),

San Bernardino County Community Services Department, San Joaquin County Department of Aging and Community Services, Maravilla Foundation, Lassen-Plumas-Sierra Community Action Agency, Colusa-Glenn-Trinity Community Action Agency, Santa Barbara Community Action Agency, Project GO, Inc., Community Enhancement Services (CES), Kern Economic Opportunity Corporation, Merced County Community Action Agency, Contra Costa Community Services Department, San Luis Obispo County Economic Opportunity Commission, Inc., and Central Coast Energy Services (CCES).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Each local agency identified the Fair Market Value of the items purchased and the amount actually paid. Fair Market Values were identified by determining what an individual would pay, in the local area, to purchase a single item. The difference between Fair Market Value and the Actual Price paid is the Value of this resource.

The number of households which benefited was determined by dividing each agency's average cost per dwelling into the amount of the savings. This represents the number of additional dwellings weatherized due to this resource.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☒ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Direct negotiations with local suppliers of weatherization materials for the LIHEAP Program resulted in lower than market costs for materials purchased in bulk quantities. As a result of the resources generated from the discount received from these bulk purchases, additional LIHEAP eligible homes received weatherization measures as appropriate and allowable within the LIHEAP contract.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 6

A. Resource/benefit name: Utility Appliance Programs: Purchase and delivery of other tangible items that help low-income households meet the cost of home energy.

B. Gross value of countable benefits provided by resource is base period: \$9,737,604

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$9,737,604

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southern California Edison (SCE), Southern California Gas Company (SCGC), Pacific Gas and Electric (PG&E), and Southwest Gas Corp and The Energy Coalition.

4. Brief description of resource:

Purchase and installation of energy efficient stoves/ranges, water heaters, evaporative coolers, refrigerators, and furnaces which were used in the dwelling for the purpose of heating/cooling.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received energy-efficient appliances at no cost.

6. Geographical area in which benefits were provided:

Riverside, Orange, Ventura, Lake, Mendocino, Solano, Yolo, San Mateo, San Bernardino, Los Angeles, Colusa, Glenn, and Trinity Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 19,569

9. Eligibility standard(s) for low income households to whom benefits were provided:

<u>xxx</u>	Income at or below 150% of the poverty level.
<u>xxx</u>	Income at or below 60% of State median income.
<u> </u>	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Riverside County Department of Community Action, Orange County Community Development Council, Inc., San Bernardino County Community Services Department, San Mateo Community Action Agency, Pacific Asian Consortium in Employment (PACE), North Coast Energy Services, Ventura County Commission on Human Concerns, Maravilla Foundation, Colusa-Glenn-Trinity Community Action Agency and Community Enhancement Services (CES).

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies listed in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified by determining FMV of the appliances and the cost of installation.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- xxx (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A B xxx C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because LIHEAP eligible and other low-income households are identified as needing repair or replacement of appliances during the time the dwelling is being assessed for weatherization services. Additionally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity in the low-income community.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 7

A. Resource/benefit name: Utility Donated Repair: Donated labor and materials to repair and install tangible items that help low-income households meet the cost of home energy.

B. Gross value of countable benefits provided by resource is base period: \$7,160

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment):

D. Costs and charges to low income households to participate/receive these benefits:

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$7,160

2. Type of Resource: Cash Discount/ Waiver xxx In-kind Contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
Southern California Edison (SCE), and Pacific Gas and Electric (PG&E)

4. Brief description of resource:
Repair or replace gas appliances (furnaces, gas stoves, and hot water heaters) and evaporative coolers.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
Low-income households received repairs/replacements of gas appliances and evaporative coolers at no cost.

6. Geographical area in which benefits were provided:
Riverside County and Humboldt Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 88

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Riverside County Department of Community Action and Redwood Community Action Agency.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified using the actual cost of the parts to repair, or the cost of the appliance to replace, plus the cost of installation.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A B C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because eligible households are identified as needing replacement appliances during the time the dwelling is assessed for LIHEAP weatherization services. In addition, some of the appliances replaced posed a potential safety hazard for the household which would have been exacerbated by the weatherization services.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 8

A. Resource/benefit name: Utility Bill Assistance Combined with LIHEAP: Cash benefit on behalf of low-income households for energy crisis.

B. Gross value of countable benefits provided by resource is base period: \$3,383,577

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$3,383,577

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric (PG&E), Salvation Army, Ben Lomond, Southern California Gas Company (SCGC), Southern California Edison (SCE), Valley Churches United Missions, City of Riverside Public Utilities, Imperial Irrigation District, Catholic Social Services, St. Vincent DePaul, Santa Clara County Social Services Agency Emergency Assistance Network, LA Utility Assistance Program, Emergency Shelter, United Way and Christian Action Life Line.

4. Brief description of resource:

Assisted clients with energy bills in conjunction with LIHEAP energy assistance.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Prevented the shut-off of utilities for low-income households by combining the resources.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 16,162

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

San Mateo County Community Action Agency, Inc., Economic and Social Opportunities, Inc. (ESO), Orange County Community Development Council, Inc., Riverside County Department of Community Action, Central Valley Opportunity Center, Inc. (CVOC), San Joaquin County Department of Aging and Community Services, Kern County Economic Opportunity Corporation, Campesinos Unidos, Inc. (CUI), and Contra Costa County Community Services Department and Central Coast Energy Services.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local public and private agency, churches, and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual amount of the utility bill paid on behalf of the client.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- xxx

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A xxx B C D xxx E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP due to funds from both sources (LIHEAP and utility companies/third-party co-payments) being used in the same household. The low-income household benefited by receiving LIHEAP assistance in addition to assistance from either the utility company program or third-party co-payment once the LIHEAP program's maximum level of assistance was reached.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 9

A. Resource/benefit name:

Utility Bill Assistance--Payment for additional households without LIHEAP:
Cash benefits on behalf of recipient households for energy crisis.

B. Gross value of countable benefits provided by resource is base period: \$3,941,201

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$3,941,201

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric (PG&E), Salvation Army, Southern California Gas Company (SCGC), Southern California Edison (SCE), SAFE Sierra Pacific EAP, SHARE UP Natural Gas Energy Assistance, American Red Cross, City of Ukiah, City of Riverside Public Utility Company, Southwest Gas Corporation, Santa Clara County Social Services Agency Emergency Assistance Network, City of San Jose, County of Santa Clara, Solano County Family Resources Centers, United Way, and San Diego Gas and Electric.

4. Brief description of resource:

Payments made directly to utility providers on behalf of low-income households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Prevented the shut-off of utilities for low-income households.

6. Geographical area in which benefits were provided:

California -- Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 32,254

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

San Joaquin County Department of Aging and Community Services, Ventura County Commission on Human Concerns, El Dorado County Department of Community Services, Economic and Social Opportunities, Inc. (ESO), Community Services and Employment Training, Inc. (C-SET), North Coast Energy Services, Riverside County Department of Community Action, and California Department of Community Services and Development.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and utility company records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual amount of the utility bill paid on behalf of the client.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- xxx

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 A B C D xxx E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

To ensure that low-income households have year-around access to energy assistance and that the greatest number of low-income households receive assistance, local agencies have coordinated the services provided under LIHEAP with local private and public energy assistance programs. The coordination of these programs enables the agencies to expand emergency services to families who otherwise would not receive assistance through LIHEAP due to insufficient funds. This coordination occurs through prearranged agreements between the local LIHEAP contractors and the utility assistance providers. The LIHEAP contractors work in direct conjunction with the utility assistance providers by maintaining ongoing communication to screen potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if any benefits have already been received by the applicant from either source.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 10

A. Resource/benefit name: **Donated Unpaid Labor and/or Weatherization Materials:** Donated labor and/or materials to repair, replace and install weatherization measures.

B. Gross value of countable benefits provided by resource is base period: **\$316,730**

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): **\$316,730**

2. Type of Resource: _____ Cash _____ Discount/ Waiver **xxx** In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Orange County Community Development Council, Inc., Paint Your Heart Out, Inc., Rebuilding Orange County Together, Court Referrals, Licensed Contractors, Independent Contractors, Rebuilding Together, and Senior Coastsiders.

4. Brief description of resource:

Staff persons and vendors donated hours to the LIHEAP Weatherization program.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Service to eligible LIHEAP clients. Staff/vendors assisted in the installation of weatherization materials (as listed in Resource #5) to homes; repairing and replacing heating units and water heaters and manufacturing shadescreens.

6. Geographical area in which benefits were provided:

Orange, San Mateo, Riverside and Santa Barbara.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 638

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Orange County Community Development Council, Inc., San Mateo County Community Action Agency, Inc., and Riverside County Department of Community Action.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records: Daily staff logs and time sheets.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Orange: CAPOC \$4,500 per HH x 14 households = \$63,000, & RTOC \$3,500 per HH x 6 = \$21,000.

San Mateo: Court Referrals \$35 per hour x 869 hours = \$30,415; Rebuilding Together & Senior Coastsiders \$1,537 x 117 HH=\$179,829.

Santa Barbara: \$123.63 x 120 units=\$14,835.60; \$450.00 x 17units=\$7,650.00

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- | | |
|------------|--|
| _____ | (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid. |
| <u>xxx</u> | (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan. |
| _____ | (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program. |

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____ A _____ B _____ C _____ D _____ E _____ F _____ G _____ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 11

A. Resource/benefit name: In-House Manufacturing: Reduction in the cost of weatherization materials installed.

B. Gross value of countable benefits provided by resource is base period: \$205,424

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$205,424

2. Type of Resource: _____ Cash xxx Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

R. Lang, El Dorado County Department of Community Services, ACI Glass, Round Tree Glass, South Bay Window and Glass, Central Valley Opportunity Center (CVOC), AM Conservation, Colusa-Glenn-Trinity Community Action Agency, San Mateo Community Action Agency Corporate Core, Project GO, Inc., San Joaquin, Sonoma and Placer.

4. Brief description of resource:

In-house manufacturing of storm windows, solar screens, glass windows, doors and cooler covers.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Materials manufactured in-house at cost enabled agencies to service more low-income households.

6. Geographical area in which benefits were provided:

El Dorado, Alpine, Lake, Mendocino, Solano, Yolo, Siskiyou, San Diego, Stanislaus, Lassen, Plumas, Colusa, Glenn, Trinity, San Mateo, San Joaquin, Sonoma and Placer Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 885

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

El Dorado County Department of Community Services, Central Valley Opportunity Center (CVOC), Great Northern Corporation, Metropolitan Area Advisory Committee (MAAC), Lassen-Plumas-Sierra Community Action Agency, Colusa-Glenn-Trinity Community Action Agency, San Mateo Community Action Agency, and Project GO, Inc.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records and local vendor records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual cost charged to LIHEAP versus fair market value determined by local vendors = net countable difference.

FMV	\$565,224
Actual	<u>359,800</u>
Discount	205,424

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- xxx (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____ A _____ B _____ C _____ D _____ E _____ F _____ G _____ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 12

A. Resource/benefit name: Corporate Cash Donations: Cash benefit for utility bill assistance and weatherization services.

B. Gross value of countable benefits provided by resource is base period: \$104,529

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$104,529

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Project GO, Inc. General Fund, and Santa Barbara Private and Corporate Cash Donations.

4. Brief description of resource:

Corporate funds allocated for utility assistance, emergency fund accounts and for direct weatherization.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Funds used for assistance with utility deposits and emergency home repairs which enabled weatherization of dwellings. Types of weatherization assistance provided included installation of one or more of the weatherization measures as listed in Resource #5.

6. Geographical area in which benefits were provided:

Placer and Santa Barbara Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 92

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Project GO, Inc., and Santa Barbara County Community Action Agency.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Santa Barbara: \$65,254 donated, divided by \$1106 per home = 59 homes

Project GO: \$39,275 donated, divided by \$1190.15 per home = 33 homes

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- ☐ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- ☐ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- ☒ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A B C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Funds were used in conjunction with LIHEAP to assist with utility deposits; to repair homes prior to receiving weatherization materials and for direct weatherization of LIHEAP eligible households which would not have received assistance due to lack of funding availability. As a result of the resources generated from these cash donations, additional LIHEAP eligible households received weatherization measures mentioned in Resource #5 as appropriate and allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 13

A. Resource/benefit name: Discounted Fuel: Wood and Propane contributed to program.

B. Gross value of countable benefits provided by resource is base period: \$43,895

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment):

D. Costs and charges to low income households to participate/receive these benefits:

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$43,895

2. Type of Resource: Cash xxx Discount/ Waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
Local Wood Vendors.

4. Brief description of resource:
Discount of firewood purchased for low-income clients.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
Reduced price on wood and propane purchased with LIHEAP funds and distributed at no charge to low-income households.

6. Geographical area in which benefits were provided:
Lassen, Plumas, Sierra, and Trinity Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 439

9. Eligibility standard(s) for low income households to whom benefits were provided:

<u>xxx</u>	Income at or below 150% of the poverty level.
_____	Income at or below 60% of State median income.
_____	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Lassen-Plumas-Sierra Community Action Agency, Colusa-Glenn-Trinity Community Action Agency.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Lassen, Plumas, Sierra: FMV 987 cords @ \$160 per cord = \$157,920

Actual 987 cords @ \$125 = \$123,375

Discount = \$34,545

Colusa-Glenn-Trinity: FMV 110 cords @ \$200 per cord = \$22,000

Actual 110 cord @ \$115.00 per cord = \$12,650

Discount = \$9,350

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- _____ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- xxx (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- _____ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 14

A. Resource/benefit name: Landlord Contribution for Weatherization and Health and Safety related repairs.

B. Gross value of countable benefits provided by resource is base period: \$105,993

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment):

D. Costs and charges to low income households to participate/receive these benefits:

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$105,993

2. Type of Resource: Cash Discount/ Waiver xxx In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
Local Landlords in Humboldt County, Cathedral City and Los Angeles.

4. Brief description of resource:
Performed weatherization related minor home repairs.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
The repairs were a pre-requisite to receiving weatherization.

6. Geographical area in which benefits were provided:
Humboldt, Los Angeles, and Riverside counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 168

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
xxx	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Redwood Community Action Agency, Riverside County Department of Community Action, Pacific Asian Consortium in Employment (PACE), Local Landlords, and Mountain View Apartments, Cathedral City.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Cost agreements between local landlords and Redwood Community Action Agency, Riverside County Department of Community Action, and Pacific Asian Consortium in Employment, based upon fair market value.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install these measures. All of the costs were paid for by the landlord.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- xxx

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

 A B C D xxx E xxx F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Direct negotiations with the landlord resulted in minor home repairs being done which enabled LIHEAP weatherization to occur. Due to this coordination of resources, additional LIHEAP eligible households received weatherization measures as appropriate and allowable within the LIHEAP contract.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 15

A. Resource/benefit name: Discount on Services Rendered

B. Gross value of countable benefits provided by resource is base period: \$1,071,814

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$1,071,814

2. Type of Resource: _____ Cash xxx Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Air Solutions Heating and Air, Kool-Air, Clear Images, RMCI, Jonas Oil Company, Ace and Sons Construction, Sundowner Insulation Company, Eel River Fuels, Consumer Protection Refrigeration, and Oasis Heating and Air Conditioning Company.

4. Brief description of resource:

Below fair market value of repair/replacement of furnaces, appliances, windows, and floor heaters as well as minor home repairs for the LIHEAP Weatherization Program. Discounts were received on the cost of installing weatherization measures. Types of weatherization assistance provided included the installation of one or more of the weatherization measures as listed in Resource #5.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount allowed additional low-income clients to be served.

6. Geographical area in which benefits were provided:

Sacramento, Sutter, Yuba, Santa Clara, Lake, Mendocino, Solano, Yolo, Riverside, Fresno, and Kern Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03 -- 9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 13,439

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx	Income at or below 150% of the poverty level.
	Income at or below 60% of State median income.
	Other - Specify:

10. Agency/agencies that administered resource/benefits:

Community Resource Project, Inc. (CRP), Economic and Social Opportunities, Inc. (ESO), North Coast Energy Services, Riverside County Department of Community Action, Fresno County Economic Opportunities Commission, Santa Barbara County Community Action Agency, and Kern County Economic Opportunity Corporation.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

CRP: FMV \$92,632 - Actual \$73,044 = \$19,588

ESO: FMV \$436,264 - Actual \$363,554 = \$72,711

North Coast Energy: FMV \$302,260 - Actual \$285,420 = \$16,840

Riverside: FMV \$450,000 - Actual \$360,000 = \$90,000; FMV \$18,167.38 - Actual \$16,350.64 = \$1,816.74; FMW \$38,400 - Actual \$34,560 = \$3,840

Fresno: FMV \$3,613,328 - Actual \$2,749,743 = \$863,585

Kern: FMV \$20,606 - Actual \$17,172 = \$3,434

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

_____ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

xxx (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

_____ (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____ A _____ B _____ C _____ D _____ E _____ F _____ G _____ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 16

A. Resource/benefit name: Donated Paid Staff Services

B. Gross value of countable benefits provided by resource is base period: \$980

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment):

D. Costs and charges to low income households to participate/receive these benefits:

E. Net value of countable benefits provided by resource during this base period.
(To calculate item E, subtract items C and D from item B): \$980

2. Type of Resource: Cash Discount/ Waiver xxx In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

HVAC Subcontractor

4. Brief description of resource:

Donated staff labor to assist with weatherization work.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See item 4.

6. Geographical area in which benefits were provided:

Los Angeles County

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 1

9. Eligibility standard(s) for low income households to whom benefits were provided:

xxx Income at or below 150% of the poverty level.
 Income at or below 60% of State median income.
 Other - Specify:

10. Agency/agencies that administered resource/benefits:

Pacific Asian Consortium in Employment (PACE)

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

PACE: \$28.00 per hour x 35 hours = \$980.00

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

 (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

xxx (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

 (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

_____ A _____ B _____ C _____ D _____ E _____ F _____ G _____ H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee California Department of Community Services and Development Base Period: 10/1/03-9/30/04

1. Resource # 17

A. Resource/benefit name: City and County Funded Energy Assistance

B. Gross value of countable benefits provided by resource is base period: \$59,837

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): _____

D. Costs and charges to low income households to participate/receive these benefits: _____

E. Net value of countable benefits provided by resource during this base period.
 (To calculate item E, subtract items C and D from item B): \$59,837

2. Type of Resource: xxx Cash _____ Discount/ Waiver _____ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

City of Berkeley, and County of Glenn.

4. Brief description of resource:

City and County funds allocated for utility assistance, emergency fund accounts and for direct weatherization.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Funds used for assistance with utility deposits and emergency home repairs which enabled weatherization of dwellings. Types of weatherization assistance provided included installation of one or more of the weatherization measures as listed in Resource #5.

6. Geographical area in which benefits were provided:

Alameda and Glenn Counties.

7. Month(s) and year(s) when benefits were provided to recipients during this base period:

10/1/03-9/30/04

8. Number of low-income households to whom benefits were provided in this base period: 28

9. Eligibility standard(s) for low income households to whom benefits were provided:

<u>xxx</u>	Income at or below 150% of the poverty level.
<u> </u>	Income at or below 60% of State median income.
<u> </u>	Other - Specify:

10. Agency/agencies that administered resource/benefits:

City of Berkeley, and Colusa-Glenn-Trinity Community Action Agency.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install these measures. Actual amount of utility bill assistance paid on behalf of the low-income households. All funds were paid from local City and County funded contracts.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- xxx (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xxx A B C D E F G H

If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Funds were used in conjunction with LIHEAP to assist with utility deposits; to repair homes prior to receiving weatherization materials and for direct weatherization of LIHEAP eligible households which would not have received assistance due to lack of funding availability. As a result of the resources generated from the City and County General Fund, additional LIHEAP eligible households received weatherization measures mentioned in Resource #5 as appropriate and allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.